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ABSTRACT

This guide is intended for use in conducting an eight-session workplace literacy course that will help employees in the manufacturing and service industries acquire necessary job-specific telephone usage skills. The instructional materials included in the guide are designed to teach students to accomplish the following: use professional answering skills and effective listening skills, recognize different caller behaviors and types of calls, handle difficult callers, respond to callers' needs, screen and transfer calls, return customer calls promptly, and solve caller problems to the best of their ability. Presented first are lists of course objectives and topics. The remainder of the guide consists of eight sections of learning activities dealing with the following topics: telephone answering techniques; question techniques for gathering information; effective listening; caller behaviors; types of calls; and procedures for returning calls, handling (negotiating with) difficult callers, and transferring calls. (MN)

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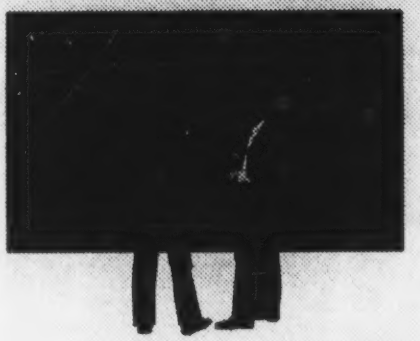
Telecommunications in the Workplace



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☎ *TELECOMMUNICATIONS* ☎

The telephone is one of the most important business tools. The way you handle calls determines whether you create business or lose it. This course will help employees improve their telephone techniques, maintain a positive attitude, and listen actively to their customers' needs. Using role plays, the tape recorder, worksheets and class discussion, employees will get many opportunities to practice these skills.

OBJECTIVES:

At the end of this class, students will be able to do the following:

- use professional answering skills
- use effective listening skills
- recognize different caller behaviors
- recognize different types of calls
- handle difficult callers
- respond to the caller's needs
- screen and transfer calls
- return customer calls promptly
- solve caller problems to the best of their ability

TOPICS:

- answering techniques
- question techniques for gathering information
- effective listening
- caller behaviors
- types of calls
- returning calls
- handling difficult callers
- transferring calls

SESSION 1 ◆ TELECOMMUNICATIONS

Techniques	Do Well	Needs Work
1. Handling the telephone	☐	☐
2. Voice inflection	☐	☐
3. Voice quality	☐	☐
4. Answering the telephone	☐	☐
5. Addressing the caller	☐	☐
6. Effective listening	☐	☐
7. Managing objections	☐	☐
8. Successful negotiation	☐	☐
9. Making calls	☐	☐
10. The follow-up call	☐	☐
11. Asking questions	☐	☐
12. Delivering bad news	☐	☐
13. Managing different behaviors	☐	☐
14. Taking messages	☐	☐
15. Managing transfers and screenings	☐	☐
16. Closing the conversation	☐	☐

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WHAT'S YOUR ATTITUDE?

Complete this survey by circling either **T** (true) or **F** (false). Try to answer each statement honestly.

1.	**T or F**	Customers expect too much from me.
2.	**T or F**	Customers should try to understand some of *our* problems.
3.	**T or F**	It is not reasonable for a customer to expect a fast response on every call.
4.	**T or F**	Customers are too dependent.
5.	**T or F**	Customers should not mind being placed on hold for a minute or so.
6.	**T or F**	If customers knew how many calls I handled every day, they would appreciate me more.
7.	**T or F**	Customers should show greater patience.
8.	**T or F**	Customers should understand why we can't help them when they first call.
9.	**T or F**	Customers are too quick to escalate problems to my supervisor.
10.	**T or F**	Most customers should try to solve their own problems before they call us.

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SESSION 2 ◆ HANDLING THE TELEPHONE

The way that you handle the telephone often determines the way that you handle the telephone call. Keep these pointers in mind!

- ☎ Be familiar with all of the features of your telephone.
- ☎ Hold the transmitter portion of the telephone directly in front of your mouth.
- ☎ Keep the telephone in a clear spot on your desk so that when you pick up the receiver, you don't bang it into anything in the way.
- ☎ Avoid side conversations while talking on the phone. Your telephone party deserves your full attention!
- ☎ Place customer on hold before you discuss his situation with a coworker.
- ☎ Don't eat or drink while talking on the phone. If your mouth is full as the phone rings, wait a few seconds until you can swallow!
- ☎ Answer in as few rings as possible.
- ☎ Ask for permission if you must put a caller on hold, and wait for a reply.
- ☎ Remember the priority of each waiting call. Make notes if necessary to help you remember who called first and who asked for what.

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STATEMENTS TO AVOID

Often, we say things over the telephone, which leave others with **negative** perceptions. Below are ten common examples. Check those that you have heard or used yourself.

1. _____ I'm sorry. Mr. Mills is still at lunch.

2. _____ I don't know where she is. May I take your number and have her call you?

3. _____ I think she is still having coffee. I'll have her call you.

4. _____ He is dealing with a big customer problem. Would you like to leave a message?

5. _____ She has a doctor's appointment.

6. _____ Mr. Jones hasn't come in yet.

7. _____ Mrs. Smith went home early.

8. _____ Your bill should be correct now.

9. _____ The person who deals with that account is on vacation.

10. _____ I don't understand why customer service didn't help you.

Think about **positive** ways of giving the message.

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STATEMENTS TO AVOID

Video "Telephone Behaviour: The Power and the Perils"

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THE THREE STAGES OF A TELEPHONE CALL

STAGE 1
The Verbal Handshake

Key Behaviors
- introduce yourself
- establish whether it's convenient to proceed

STAGE 2
Getting the Message

Key Behaviors
- control the call
- use open questions
- record information
- make "I'm listening" noises

STAGE 3
Offering Help

Key Behaviors
- volunteer useful information
- say what you are going to do

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SESSION 3 ◆ TELEPHONE TECHNIQUE –ANSWERING THE PHONE

Review and practice these 4 basic rules when answering the telephone:

☎ Use these answering courtesies:

- Greet the caller
- State your organization or department
- Introduce yourself
- Offer your help

☎ Be ***enthusiastic*** when you answer. Remember that you are trying to make the caller feel truly welcome to your company!

A tired, unenthusiastic, bored sounding voice is a real turn off!

☎ Use ***friendly phrases*** as part of your greeting:

- Thanks for calling.
- May I help you?
- How are you today?

☎ Remember to ***smile*** as you pick up the receiver. The caller may not actually *see* your smile, but he/she will hear it in your voice.

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EFFECTIVE LISTENING

Sometimes we think we are *listening* to someone, when in fact we are just *hearing* him. If we tune out or turn off the speaker, then we are not listening actively or effectively -- we are avoiding communication.

When you fail to listen actively, several things can happen:

- You will hear what you **want** to hear
- You will hear what you **expect** to hear
- You will hear just the words, not the **meaning**
- You will not recognize the difference between a **statement, an objection, or a question**

EFFECTIVE LISTENING

The first step in being an effective or active listener is to recognize the three types of expressions that you hear from callers:

- **STATEMENTS**
- **OBJECTIONS**
- **QUESTIONS**

What do you think are the differences between these three types of expressions? Can you think of examples for each?

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EFFECTIVE LISTENING

Read each expression as if it had just been delivered to you on the telephone. In the space provided, write the letter for what kind of expression you think it is -- **S** for statement, **O** for objection, and **Q** for question. For expressions that are more than just one type, write both letters in the order of your ranking (is it an objection first, then a question?).

1. _____ I think your service is really good
2. _____ I am not going to pay that bill
3. _____ Why does this bill show $126.87
4. _____ You don't understand. I need someone here today
5. _____ When do you expect the item back in stock
6. _____ I can't believe you didn't call me about this sooner
7. _____ You over-billed me on the shipping
8. _____ I'm sure you're doing the best you can
9. _____ Do you really expect me to believe you're doing your best
10. _____ Why is she never around when I need her

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SESSION 4 ◆ QUESTION TYPES

When you ask questions to get information, you have a choice of 2 types: the open and the closed. Use open questions when you want a customer to explain or discuss something. Use closed questions when all you need is a YES or a NO.

- **Open questions begin with *question words***: Who, What, Where, When, How, Why, How many, How big, How much, How often

Examples:

How often does that happen?
What did you do before the problem started?
When did the package arrive?
Why didn't you call me earlier to let me know about the rate change?

- **Closed questions begin with words like these:** Did, Can, Have, Will, Do, Is, Are, Would, Should, Could, May

Examples:

Did you call them?
Do you have your bill?
Have you received our refund?
May I do that for you?

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OPEN OR CLOSED?

Identify the questions below as either **OPEN** or **CLOSED**. Write an **O** for OPEN and a **C** for CLOSED in the space provided.

1. _____ What did you do with the disk?
2. _____ Did you put the customer's paperwork on the desk?
3. _____ Have you paid the bill?
4. _____ What do you want me to do?
5. _____ How much detail do you require?
6. _____ Can the terminal be fixed?
7. _____ Is the customer holding?
8. _____ How long has that customer been holding?
9. _____ Why did our incoming calls stop at 3:00?
10. _____ Who do you want to speak to?
11. _____ Should we bill you directly?
12. _____ When did you receive our catalogue?
13. _____ You heard about our new client discount, didn't you?
14. _____ Where can we contact you during the day?
15. _____ Is there anybody else we can send this to?
16. _____ Would you mind not telling me how to run our business?
17. _____ If I forwarded you to the manager, would you explain the problem to him?

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CALLER BEHAVIORS

Not only are calls different, but callers are different too. It is important to recognize the differences in people and adjust your response in order to handle the call effectively.

1. Assertive/ Demanding
2. Angry
3. Passive
4. Talkative

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HANDLING THE ASSERTIVE / DEMANDING CALLER

1. Listen so that you will understand the problem or request

2. Match some of the customer's assertiveness
   How to raise your assertiveness level:
   a) If your voice is soft, raise it softly
   b) Be direct and to the point
   c) Keep the non-business conversation to a minimum

   Note: keep your assertiveness level just below that of the caller

3. Use closed questions to help control the conversation

4. Be friendly, but specific and direct in your statements

5. Remain courteous

HANDLING THE ANGRY CALLER

1. Listen closely so that you will understand the problem

2. Relate by apologizing in a general way, or in a broad sense

3. Restate the problem, focusing on the main elements so the customer knows that you understand clearly

4. Propose a plan of action that is in your power to do

5. State clearly and concisely what you intend to do, and then do it

6. Stay calm and avoid getting involved in the customer's emotion

7. Remain courteous

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HANDLING THE TALKATIVE CALLER

1. Ask closed questions

2. Between sentences, use a shorter pause than normal

3. Do not invite unnecessary non-business conversation

4. Keep your responses to a minimum, always steering the conversation back to the point

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SESSION 5 ◆ HANDLING THE PASSIVE CALLER

1. Don't take the passive caller for granted

2. Don't assume the caller is satisfied with the service received – remember, if he is not happy, he will take his elsewhere

3. Try a combination of closed and open questions – the former initiates a response, while the latter gives you the opportunity to try to get more substantial feedback

4. Don't put words in the caller's mouth!

5. Be careful not to babble on to compensate for the silences

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VOICE QUALITY

Here are some strategies for improving the **quality** of your voice:

☺ Warm up by **humming** a song. This will relax your vocal chords and give your voice a richer tone.

☺ Speak into a **tape recorder or use voice mail** varying your pitch and control. Then listen to the playback and critique yourself.

☺ Role play with a colleague and **tape-record** your dialogue. Listen to the playback and critique yourself.

☺ Put a **smile** into your voice! Just smile as you answer the phone, and the person at the other end will receive that smile in your inflection.

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MANAGING OBJECTIONS

If the caller is opposed to your proposed plan of action, he/she will offer an **objection.** It is important that you do not ignore it, but **address it immediately**.

Example:

Customer: Your prices seem high. I think I should shop around and compare prices before placing my order.

Jim: I'm sure you'll be satisfied with our product. We can deliver by Monday.

How should Jim have responded?

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MANAGING OBJECTIONS

If you ignore objections or questions, a caller will do any of the following:

- stop you and repeat the objection or question
- not say anything to you, but still be dissatisfied because you ignored him/her.
- decide to take his/her business elsewhere

MANAGING OBJECTIONS

LISTEN TO WHAT THE CALLER SAYS

PROVIDE AN IMMEDIATE RESPONSE

STATE THE RESPONSE CLEARLY AND POSITIVELY

AVOID GIVING UNNECESSARY INFORMATION AND CONVERSATION

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SESSION 6 ◆ NEGOTIATING WITH A CALLER

Tips for Successful Negotiating

- ☺ Ask questions to determine the problem
- ☺ If your caller becomes demanding or aggressive, raise your voice slightly to become more assertive
- ☺ As you control the service, you are in a position to suggest a compromise or make another arrangement
- ☺ When you select a course of action, be direct and specific in your statements
- ☺ Remain positive and service oriented

Remember:
Even though you cannot always provide what the caller wants, it is important to deliver your response in a courteous manner.

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NEGOTIATING WITH A CALLER

Read the scenario below and then, in pairs, role play the conversation, so that you provide a compromise that is acceptable to both parties.

- A client has called with a question and will not get off the phone until he/she gets an answer to the question. However, the person who could answer the question is not available.

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TRANSFERRING CALLS

If a call comes in for another person, or if *you* cannot help the caller, then you must transfer the call to the correct person. Follow these guidelines when transferring a call.

Explain to the caller that you are going to make the transfer -- make sure you explain where and to whom you are transferring the caller. Give **the name, the department, and the extension number** of the person to whom the caller is being transferred.

Ask for **approval** and wait for a **reply**

Briefly **explain** the voice mail system -- that after X number of rings, if the person does not pick up then voice mail goes into effect

Ask for **approval** on the voice mail option and wait for a **reply**

Tell the caller to wait a moment and then **transfer** the call

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SESSION 7 ◆ CLOSING THE CONVERSATION

When you finish your conversation, there are some appropriate and courteous things to do:

- **Thank** the customer for calling
- Let the customer know that you **appreciate** his/her business
- Provide **assurance** that any promises will be fulfilled
- Leave the customer with a **positive** feeling
- Close with a **courteous statement** such as "Feel free to call us anytime," or "I enjoyed talking with you."
- **Let the customer hang up first.** This is a simple courtesy, and it give the customer a final opportunity to add something.

Can you think of some other examples of courteous closing statements?

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CALLING THE CUSTOMER BACK

When you are unable to handle a request at the time of the original call, here are four callback steps to follow:

1. briefly **explain the need** for the callback

2. **ask for permission** to make a callback

3. **make a commitment** to call at an agreed upon time

4. **personalize** your statements

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SESSION 8

Students retake the initial 2 "self-check quizzes" and discuss changes in attitudes and approaches to telephone skills.

The rest of the class is used for student role plays, taping and evaluations.

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